



PHASE II Specific Scope of Work ***February 2004 – May 2004***

The following six activities incorporate and enhance Steps 1-12 of Phase II: Specific Scope of Work as outlined in the General Scope of Work FY 2003-2005.

Activity 1: Project Start-Up

February - March

- **Institute Assessment Headquarters Office**
- **Define Assessment Standards**
- **Determine Building Classification System**
- **Task Force Meeting[s]**



Institute Assessment Headquarters Office

January 26 – February 27

The Adequacy Assessment Headquarters is located at 4100 Richards Rd., North Little Rock. The Headquarters has been in operation since January 26, 2004 and will remain open through December 2004 upon completion of the Statewide School Facilities Adequacy Assessment. The DeJONG group will be responsible for procuring equipment and providing program management staff consisting of planners, coordinators, and other technically skilled staff members. In addition, a web site is currently being developed at www.arkansasfacilities.com to provide an infrastructure for communication with staff, the Task Force to Joint Committee on Educational Facilities, and the public of Arkansas.

Define Assessment Standards

March 29 – June 30

A set of standards will be utilized in order to conduct the statewide school facility adequacy assessment. The DeJONG group will work in conjunction with the sub-committees of the Task Force and the Arkansas State Department of Education to develop facility standards, deferred maintenance [building condition] standards, and educational adequacy standards. The following outlines the process to develop these standards:

1. Review existing standards
2. Develop Space Requirements for elementary, middle, and high Schools
3. Formulate planning assumptions
4. Draft Standards
5. Review and develop Standards with the Standards Committee, Format & Values Committee, Custodial/Maintenance Committee, and Technology Support Committee
6. Finalize Standards to be used to determine equity, adequacy, and general condition for all public school facilities for their intended use

All K-12 structures will be assessed. The level of assessment and prioritization of repair, renovation or replacement of the structures will be developed in conjunction with the Task Force. The structures to be assessed are grouped into the following categories or into categories as determined through consultation between the DeJONG group and the Task Force.



Task Force to Joint Committee on Educational Facilities

Instructional Facilities

Classrooms
Laboratories
Media Centers
Fine Arts
Vocational
Counseling
Gymnasiums and Field Houses –
(utilized for instruction)
Auditoriums

Auxiliary Facilities

Cafeterias
Health Services
Food Services
Maintenance/Custodial
Transportation

Administrative Facilities

School Building Level
District-Wide Level

Extra Curricular/ Athletic Facilities

Outdoor Athletic Facilities
Gymnasiums and Field Houses -
utilized exclusively for athletics

Temporary Buildings – (use and
size assessment only)

Buildings Under Construction –
(Cursory review of contract
documents only)

Hazardous Material Documentation – (Based solely on information provided by the Department of Education, Department of Labor, Department of Environmental Quality, Department of Health and any other State Department with records concerning hazardous materials on school facility sites and/or detected or evidenced by Assessment Contractors during inspection.)

Excluded from the assessment are:

Furniture and Equipment Not Attached to the Structure
Technology peripheral equipment (computers, printers, monitors, servers, cameras, etc.)

Deferred maintenance [building condition] standards will also be identified. Standards will be developed for all site issues such as parking lots, playgrounds, and all exterior and interior structural systems such as walls, windows, and finishes. Included in this definition are all components of the structure support systems required to operate and protect the building and its occupants. These include, but are not limited to all plumbing, electrical, HVAC, and mechanical systems.

Finally, educational adequacy standards will be developed to address space requirements based on current and proposed teacher/student ratios and curriculum standards along with current technology accessibility requirements, within reasonable exception, as adopted by the State of Arkansas and current and proposed educational standards as defined by the Arkansas Department of Education. Facility standard requirements related to educational adequacy standards set forth by the 2004 Arkansas Special Session will be incorporated into the assessment standards.

Determine Building Classification System

March 29 – June 30

Depending on the age of a school and the building systems, there are facility issues that need to be addressed. Newer buildings typically need general maintenance, and function adequately for current programs. Older buildings typically require major renovation or replacement, along with expansion of core facilities due to programmatic requirements.

The DeJONG group will work in conjunction with the Format and Values Sub-Committee of the Task Force to determine the building classification system. The Definition of building classifications or “**State of Condition**” (SOC), will be used to delineate, within a reasonable range, the “adequacy” of all public school facilities. This classification system provides values and individual scopes of works for facilities to perform and document assessment. For example, a definition or classification between a facility that meets all current building safety, health and accessibility standards, and a facility that does not provide all the space requirements based upon current curriculum standards will be established.



Activity 2: Data Collection & Software Customization

February – April

- **Define Assessment Criteria**
- **Adapt Software**
- **Assemble Existing Building Data & Drawings**
- **Task Force Meeting[s]**



Define Assessment Criteria

February 9 – April 23

An assessment survey will be developed based on a list of primary building assets to be identified and tagged by each assessment team. Priority levels will be established and assigned to each correction. Further, the priority criteria will have an associated timeframe for correcting deficiencies found by the Task Force.

Adapt Software/Determine Reporting Format and Tools

February 16 – April 23

Based on the work performed above, the Program Manager will tailor the APPLE assessment software to the requirements of the State of Arkansas. APPLE is already used in large-scale school facility assessment studies and will enable the State to maintain an inventory of all school facilities, their baseline information such as square footage, building systems and all related deficiencies at the time of the assessment. In addition, the APPLE software provide deficiency costs as well as the life cycle costs of those building systems in order to provide forecasting for future facility needs.

Assemble Existing Building Data and Drawings

March 8 – June 30

In an effort to prepare the assessment teams with the resources needed to install this undertaking, the DeJONG group will collect baseline information for each school in order to construct a database to be used throughout the massive input of assessment information. Examples of preliminary information included, but are not limited to:

School Name (Cooperative/District)	School Enrollment
Location (County/Street/Address)	Grades Housed
Primary Contact (Name/Title/Phone)	Year[s] Constructed
Type of School	Estimated Square Footage
	Estimated Site Size
	Building Drawings

Data for each school district will be attained prior to assessment and will be validated through the assessment process. In addition, it is necessary to collect the following demographic information in order to develop enrollment projections.

- District-wide Demographics
- Enrollment Data
- Live Birth Data



Task Force to Joint Committee on Educational Facilities

Activity 3: Pilot Study & Training

March - May

- **Define and Procure Field Assessment Firms**
- **Perform Pilot Study**
- **Task Force Meeting[s]**



Define and Procure Field Assessment Firms

February 9 – April 30

In conjunction with the Assessment and Monitoring Operations Committee, assessment team members will be clearly defined and manpower requirements determined. Beginning in February a Request for Proposal will be developed in order to solicit field assessment firms. The procurement process will adhere to all State guidelines and requirements. The following outlines the procurement process.

1. Definition of field assessment teams
2. Develop request for proposal [RFP], firm qualifications, and solicit and accept proposals from local, state, and national firms experienced with public school facility assessment and monitoring
3. Determine manpower requirements for assessment teams and establish geographical zones to assign field assessment teams
4. Review proposals and submit recommendations for selection of field assessment firms
5. Issue "Notice to Proceed" to selected firms
6. Develop training materials and conduct instructional sessions starting the week of April 26 with each assessment team to insure consistency, uniformity, and accuracy of collected information

All field assessment firms to be selected, field equipped, and trained by May 31, 2004.

Perform Pilot Study

April 5 – April 9

The DeJONG group or appointed assessment team will schedule and perform an assessment of representative schools as a pilot study to test the overall assessment process in order to eliminate any unknown variables, verify assumptions to date, and confirm final deliverables. The pilot study will be used as a relevant example for assessment team training, public relations, and other communication efforts.



Task Force to Joint Committee on Educational Facilities

June 2004 – December 31, 2004

Activity 4 Conduct Assessment

.June - September

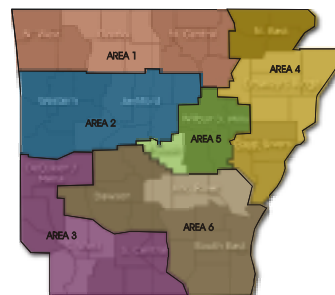
Coordinate Statewide Assessment

Oversee Statewide Assessment

Develop Ten Year Enrollment Projections

Create Statewide GIS Program for Facilities

Task Force Meeting[s]



Coordinate Statewide Assessment

June 1 – September 30

Geographically, the state will be divided into six planning regions [assessment areas], each equal to approximately 200 schools. A project coordinator from the DeJONG group will be assigned to each assessment area as the main point of contact with the school districts as well as the assessment firms assigned to their area. The project coordinator will be responsible for obtaining baseline data for the school districts in their area as well as communicating with the districts, individually or through district cooperatives, of the assessment process, schedule, and requirements. The project coordinator will maintain and monitor a critical path schedule for each assessment team.

Oversee Statewide Assessment

June 1 – September 30

The project coordinator will monitor and control all field assessment team tasks required. The project coordinator is responsible for insuring the assessment data is entered into the established survey and software correctly and consistently. Frequent reporting and updating processes will be established while field data is collected into the master database.

Develop Ten-Year Enrollment Projections

May 3 – July 30

District-wide demographics such as number of residents, growth patterns, age of residents, number of students, types of industry, anticipated growth or decline, and other pertinent information will be collected in order to provide ten-year enrollment projections based on co-hort survival methodology. The co-hort survival methodology of projecting enrollment ages the students from birth to kindergarten, and from grade to grade, relying on historical survival ratios to project student growth or decline into the future.

Create Statewide GIS Program for Facilities

March 8 – March 19

In conjunction with the State Geographic Information Office, an appropriate level of Geographic Information Systems [GIS] will be determined. GIS data will be gathered and assembled from additional city, county, regional, and state agencies. From that point, it will be determined whether the additional service of geo-coding students, facilities, and school district boundaries is necessary and applicable to the assessment effort.



Activity 5: Data Analysis

August – October

- **Data Accumulation & Preparation**
- **Determine Facility Need**
- **Task Force Meeting[s]**



Data Accumulation and Preparation

June 1 – October 1

As assessment data is accumulated, it will be integrated into a project master database. This process will be developed and monitored in conjunction with the Format and Values Sub-Committee. Cost models will be developed for each “**State of Condition**” and scope of work determined previously. R.S. Means will be used to determine construction and renovation costs along with UNIFORMAT II as the preferred Work Break-down Structure [WBS]. Soft cost factors will include construction contingency, architectural/engineering fees, additional services, permits, fees, and legal (audit) costs. Cost estimate documentation will provide the breakdowns of labor, materials, equipment, and “soft” costs applied by its defined unit of measure.

The assessment software will be designed to provide simple and accurate methods for inventorying, estimating and tracking facility data. This information will provide a quick and understandable reporting mechanism that can provide the foundation for funding requests and capital renewal programs.



Task Force to Joint Committee on Educational Facilities

Activity 6: Report & Recommendations

November – December

- **Reports**
- **Findings & Recommended Actions**
- **Ongoing Web Site**
- **Task Force Meeting[s]**



Deliverables

November 1 – December 31

Upon completion of the assessments in August and data analysis through October, the following will be submitted to the Task Force to Joint Committee on Educational Facilities by November 1, 2004.

- Recommendations regarding accountability and monitoring procedures for achieving and maintaining facilities adequacy
- Interactive website that enables stakeholders to track ongoing project status
- Assessment report summaries by District/Cooperative
- Assessment report summary by System
- Assessment report by Building
- Building Maintenance Asset Report
- Facility Asset Report
- Facility Condition Index [FCI] Report
- All databases and data collection tools in the standardized electronic format

Upon review and revision by the Joint Committee, final deliverables will be available for presentation and public consumption on December 1, 2004.